



STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

Working Title

Mail Services Technician - Lead

Job Code Title

Mail Clerk

Pay Band

03

Job Code Number

439513

Information Technology and Processing Division

Processing and Retention Operations Bureau
Mailroom and Records Management Unit

Fair Labor Standards Act

Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state liquor stores and agencies and administers the laws governing the sale, taxation, and licensing of alcoholic beverages; and returns unclaimed property to its rightful owners.

The Information Technology and Processing Division serves as the operational foundation for the department's business units. Through secure, up-to-date computing and processing environments the division's Information and Technology Services Bureau (IT) and Processing and Retention Operations Bureau (PRO) contribute to the department's overall efficiency in document and payment processing while ensuring confidentiality, integrity, and availability of taxpayer data, whether in paper or electronic form. In providing these services, the division enables the department to meet its business objectives and facilitates its mission to serve the citizens of Montana. The division also includes the Administrative Team. The Processing and Retention Operations Bureau ensures secure handling and delivery of taxpayer information, payments, and data to the appropriate systems and staff. The bureau is organized into four units providing tax return and payment processing including Account Maintenance and Cashiering, Data Capture, E-Services, and Mailroom and Records Management. The Mailroom and Records Management Unit is responsible for the secure handling, delivery, and processing of department mail and taxpayer records.

Job Responsibilities

The Mail Services Technician leads mail and records management processing staff through work flow coordination, training, guidance, technical assistance, and feedback to ensure accurate, consistent processing of tax records. The incumbent receives, collects, processes, and delivers incoming and outgoing mail according to US Postal Service (USPS) and department postal procedures, regulations, and requirements using automated processing equipment and mail tracking systems. Provides a range of administrative services in support of data processing, records management, and taxpayer registration functions. The position reports to Mailroom and Records Management Unit Manager and provides guidance and oversight to unit staff.

• Mail Services 40%

1. Receives, sorts, and date stamps mail according to internal procedures and type. Separates priority, certified, registered, confirmed, insured, and other recorded mail for specialized processing. Counts incoming mail using mail processing equipment. Prepares and updates daily report for all incoming mail and backlogs.

2. Monitors and distributes mail to processing staff based on type of mail by opening, sorting, and screening mail. Routes tax payments to cashier unit for immediate deposit. Routes correspondence by looking up account information related to tax documents.
 3. Records tracking details for certified, registered, insured, delivery confirmed, and other specialized mail services according to department and USPS regulations. Verifies tracking forms when received.
 4. Monitors and performs daily mail out functions for the department for a limited group of tax forms and letters. Ensures accuracy and confidentiality of documents along with proper delivery instructions for specific postage requirements such as certified mail.
 5. Performs routine maintenance on automated mail opening equipment, troubleshooting problems, and working with supervisors and vendors to resolve more complex problems.
 6. Responds to problems referred by other technicians, USPS, and private couriers to ensure timely mail services processing. Records tracking details according to department and USPS regulations, verifies tracking forms upon receipt, and informs senders of incomplete or incorrect information.
 7. Ensures secure handling and delivery of taxpayer information and materials to appropriate parties.
 8. This position may provide backup USPS mail pickup and delivery for the department.
- **Mail Services Lead 30%**
 1. Troubleshoots mail services, processes, regulations, and equipment to identify and respond to training and technical assistance needs by monitoring ongoing processing, tracking errors, and determining unit training needs.
 2. Provide one-on-one training to staff by giving instructions and answering questions on the functions of mail processing and records management procedures. Provides feedback to staff and initiates added training as needed.
 3. Sets the work pace by reviewing work plans and priorities and monitoring progress. Distributes data through one-on-one and group meetings.
 4. Assesses workflow to identify the most effective use of staff and material resources to meet work unit goals and project objectives. Presents recommendations for improving workflow and performance.
 5. Provides input to the supervisor on staff performance. Suggests performance improvement, carries out actions as assigned, and reports outcomes of performance improvement actions.
 6. Develops and maintains desktop instructions for mail processing and distribution. Ensures work unit procedures are followed by all staff. Researches problems and takes steps to resolve them.
 7. Works with other units to improve workflow by organizing schedules, materials, equipment, and resources to improve the efficiency and cost-effectiveness of services.
 - **Processing Support Services 25%**
 1. Assists with taxpayer registration by updating or adding taxpayer account information from paper documents or electronically filed tax returns using system registration functions for a limited number of tax types.
 2. Assists with records management to ensure easy access, efficiency, and completeness of records. This may include retrieving and routing files for requestors, updating file out-slips, organizing files by document retrieval numbers, sorting and routing information, searching for lost files or contents, and closing or purging files.
 3. Receives and reviews tax documents for accuracy and completeness. Sorts tax returns for further processing including those to be returned to taxpayers according to established guidelines.
 4. Identifies errors and omissions, resolves basic errors, or refers to appropriate staff for resolution.
 5. Numbers tax returns using an automated numbering machine, sorts them into batches, and routes documents according to desktop instructions to appropriate staff.

6. Works with other staff to verify data; correct errors; locate lost documents, payments, and refunds. Ensures that account information is filed appropriately.
7. Takes part in testing new or changed processes to find and solve problems and help determine the effectiveness of the process.
8. Responds to requests and questions from other units by locating and providing requested information and referring specific and/or technical issues to appropriate staff.

- **Other Duties 5%**

1. Performs a variety of other duties as assigned by supervisors.

Job Requirements

To perform successfully a lead mail services technician the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details and accuracy; organizing multiple tasks within short and inflexible timelines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; following written and oral directions and instructions; identifying and correcting data errors; troubleshooting routine technical and mechanical equipment problems; and word processing, spreadsheet, and specialized database applications are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires knowledge of USPS and department postal procedures, regulations, and requirements; automated processing and tracking systems; records management; and customer service standards. The incumbent is expected to develop a progressively responsible knowledge of department work units, functions, and operations.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is graduation from high school or GED and two years of job-related work experience.
 - Work experience should include mail services, office operations, and/or records management.
 - Other combinations of education and experience will be evaluated on an individual basis.

Department Core Values

- **Respect**: As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity**: Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.
- **Productivity**: Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork**: Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

Working Conditions

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires computer and keyboard use and being seated for extended periods of time. Due to peak processing seasons, incumbent may work in excess of 40 hours per week which may include evenings and weekends. Lifting is moderate, reaching 20-35 pounds and includes carrying larger items such as tubs of tax returns and pushing or moving carts. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

Special requirements

- Background Examination: Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- Compliance with All Appropriate Montana Tax Laws: An employee's tax status must be current.

This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.

Division Administrator Review: The statements in this job profile are accurate and complete.

Signature: Margaret Kauska, Division Administrator Date: August 2010

Human Resource Director Review: The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

Employee: My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: _____ Date: _____

Name (print): _____